



Enterprise Report Management Web Interface (WEBi) User Manual

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Table of contents

1.	Introduction	1
2.	What's New	2
3.	Logging on/off	3
3.1.	Logging on	3
3.2.	Logging off	3
3.3.	Changing passwords	4
4.	Functions and navigation	5
4.1.	Search Forms pane	7
4.2.	Using the Search Forms Pane	8
4.3.	Other functions and navigation	9
5.	Searching for a document	10
6.	Viewing a document	12
6.1.	Line Data	13
6.2.	Image Data	14
6.3.	AFP Data	15
6.4.	Other Data Types	16
7.	Saving documents	17
7.1.	Downloading document properties	17
8.	Tooltips	18
8.1.	Saving a search	18
8.2.	Using a named search	20
8.3.	Additional date field search operator	21
Appendix A.	WEBi Quick reference guide	22

1. Introduction

Electronic images of all reports and various other documents, such as claims images, remittance advices, invoices, and letters are stored in the HP Enterprise Services (HPES) ERM OnDemand system. These documents can be viewed, saved, and printed from the user desktop using their internet browser, based on user security restrictions and authorizations. The OnDemand software application is used by ERM to archive electronic copies of all reports and other documents as well as store index information in the system database. WEBi is a stand-alone web client application developed to access the ERM OnDemand repository using a supported web browser and the freely available Adobe Acrobat Reader. Through ERM OnDemand, authorized users can retrieve, view, and print reports and any other documents archived by the ERM OnDemand system from the workstation.

Once logged on to ERM OnDemand, the user can retrieve desired documents by selecting from available options in the navigation panel displayed on the left side of the WEBi screen, or by using fill in the blank functionality to enter minimal search criteria on search windows to display the exact document or page needed. A text search feature is also available for locating specific data within a report after it has been retrieved, such as an individual or business name.

Retrieved data and images can be copied to the clipboard or saved as a file on the PC for additional manipulation in a spreadsheet, an MSWord document, or database applications.

2. What's New

WEBi is what would be considered a hybrid application; cross between the OnDemand32 desktop application and the OnDemand Web Enablement Kit (ODWEK or web "thin" client). A lot of the OnDemand desktop application functions are included with WEBi, but delivered via a web browser.

New WEBi application features that are not available in the current ODWEK client:

- Multi-search Predicates
- Parametric search (and/or search capabilities)
- Bi-directional column sorting (ascending/descending) of the search results list
- Multiple and single selection for viewing via icons and a toolbar
- Multiple open document windows from a single viewer framework
- Combined Line Data Viewer and Image Viewer Applet

3. Logging on/off

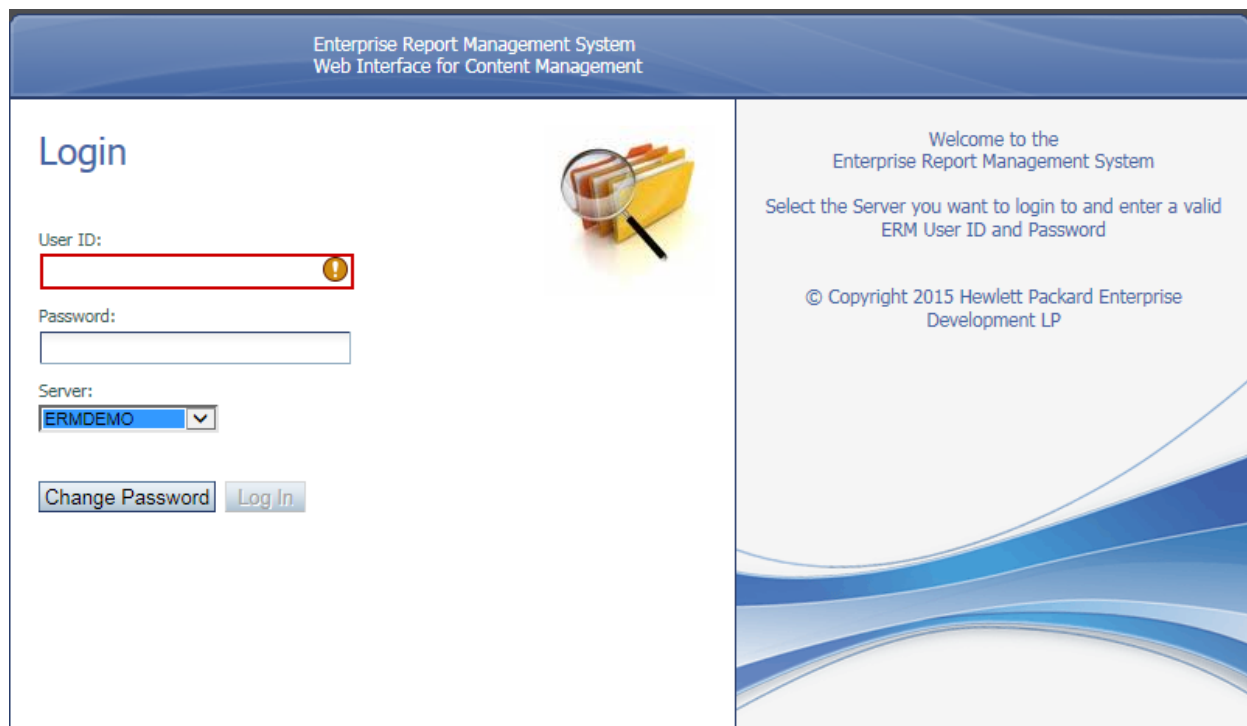
3.1. Logging on

Internet Explorer is used to log on to ERM WEBi.

1. In the browser, type <https://webi.erm.svcs.hpe.com/wccommonservices/DESKTOP.do> in the address bar and either press **Enter** or click on the **Go** arrow. The ERM WEBi **Login** window displays.

*Note: Your **DESKTOP** name is client specific, contact your ERM OnDemand Support if needed.*

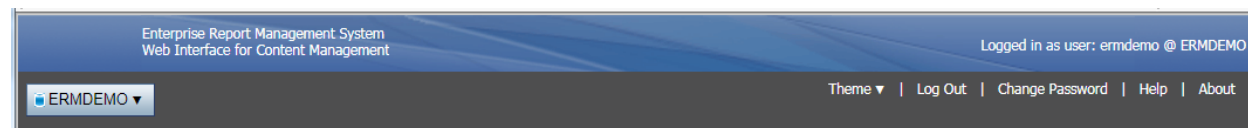
ERM WEBi Login page



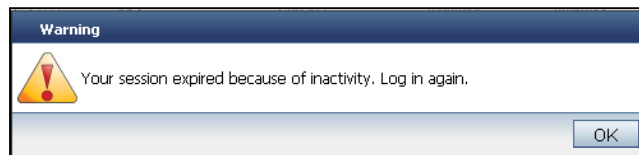
2. Enter the user login ID in the **User ID:** field. Press the **Tab** key to move to the next field.
3. Enter the user password in the **Password:** field. Either press **Enter**, or click **Log In**.

3.2. Logging off

From any window, click **Log Out** from the menu bar in upper right corner of the screen. Users should always remember to log off prior to closing the browser.



NOTE: As a security measure, each ERM WEBi client allows for a certain number of online inactivity minutes before the online connection expires. When time has elapsed, the following warning displays.



3.3. Changing passwords

Passwords in ERM WEBi are maintained within the OnDemand system.

Change password

Press the Change Password button. Enter your existing ID and Password as well as a new password and confirmation.

The login screen for the Enterprise Report Management System. The header reads "Enterprise Report Management System" and "Web Interface for Content Management". On the left, under the "Login" heading, are input fields for "User ID:" (containing "ermdemo"), "Password:", "New Password:", and "Confirm Password:". Below these is a "Server:" dropdown menu set to "ERMDemo". At the bottom left are "OK" and "Cancel" buttons. On the right, a welcome message says "Welcome to the Enterprise Report Management System" and "Select the Server you want to login to and enter a valid ERM User ID and Password". Below this is the copyright notice "© Copyright 2015 Hewlett Packard Enterprise Development LP". A magnifying glass icon is positioned between the login fields and the welcome message.

Both versions of the new password must match. If the new password and confirmation do not match, a message is displayed and the password boxes are displayed in red with exclamation points displayed in the boxes.

A screenshot of the password change form showing an error. The "New Password:" and "Confirm Password:" fields are highlighted with red borders and contain exclamation mark icons. A message box points to the "Confirm Password:" field with the text: "Both versions of your new password must match. Reenter your new password and ensure that both versions match." The "Server:" dropdown is still set to "ERMDemo".

4. Functions and navigation

The main WEBi interface is composed of six areas:

Title Bar - Displays window information including user ID and OnDemand server logged in to

Menu Bar - Displays WEBi menu options:

- **Themes** - Allows you to select color theme
- **Log Out** - Allows you to log off the server
- **Change Password** - Allows you to change your password
- **Help** - Displays on-line help
- **About** - Displays version information

Search Forms pane - WEBi Search Forms equate to OnDemand Folders

Search Section - Displays search criteria options based on the folder selected

Search Results Section - Displays list of document properties that meet the search criteria

Status Bar - Displays status messages

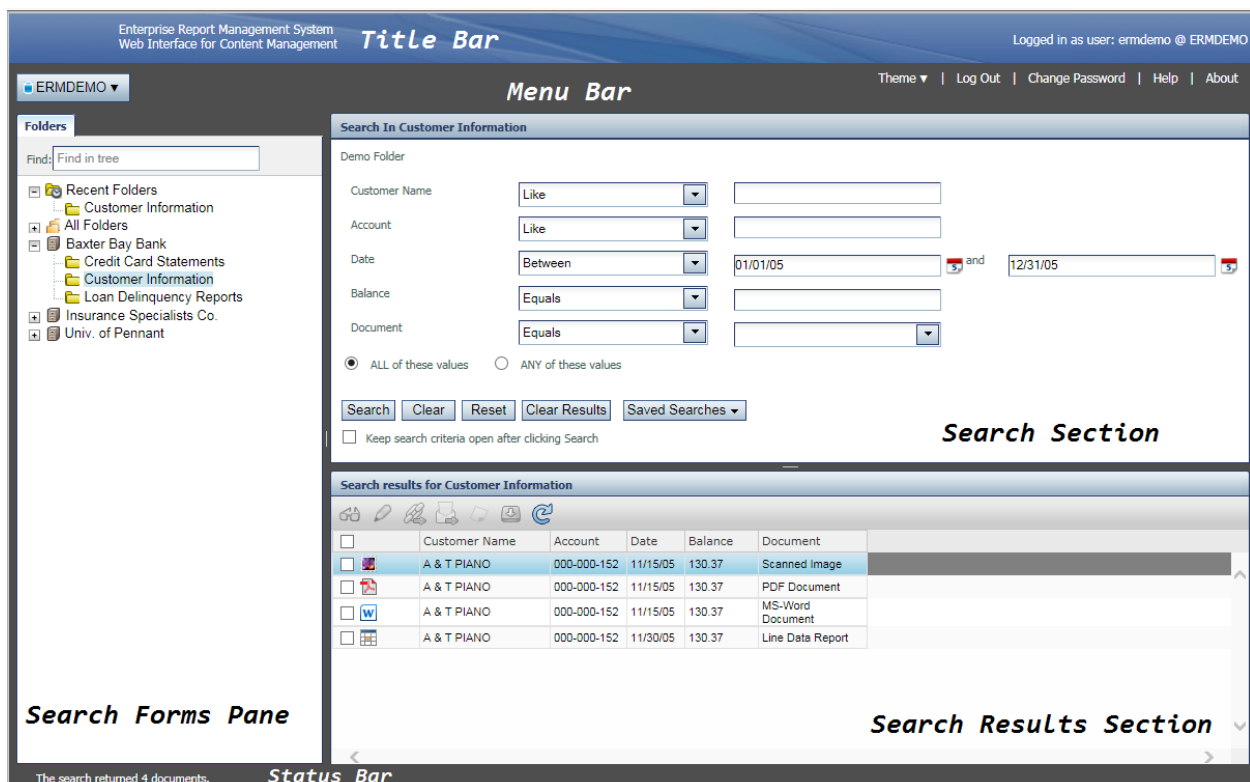


Figure 1 - WEBi Main Window

ERM WEBi Viewer Window

The WEBi Viewer window is composed of three areas:

Title Bar – Displays window information including link to on-line help

Menu Bar - Displays Viewer menu options:



Tabbed Layout



Split Vertical Layout - View two documents, one on top of the other



Split Horizontal Layout - View two documents, side-by-side



Previous Document in Results - Open previous document in the Search Results list



Next Document in Results - Open next document in the Search Results list

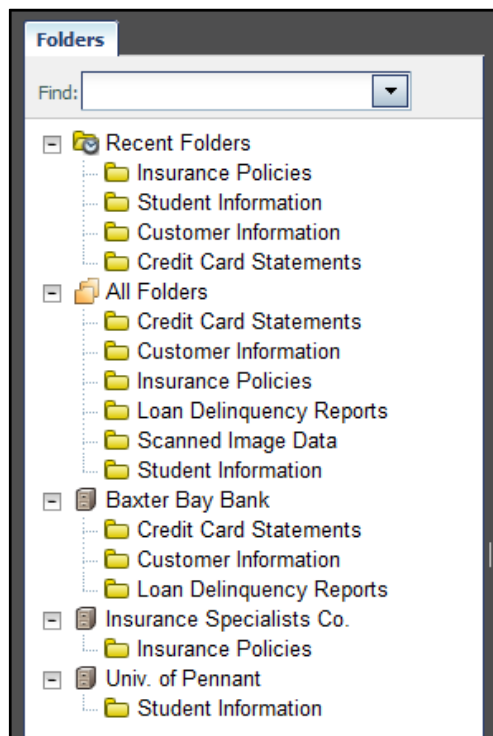
Content Area - Displays selected documents in their define view applications



Figure 2 - WEBi Viewer Window

4.1. Search Forms pane

The Search Forms pane displays a list of search forms or folders available to you according to your security access.



The **Find:** field can be used to quickly find a search form to which you have access. The **Find:** field is case sensitive. While it is not necessary to use wildcard characters in the **Find:** Field, because the server automatically inserts them, the following can be used at the beginning or end of your search:

- Asterisk (*) – multiple character wild card
- Percent sign (%) - multiple character wild card
- Question mark (?) – single character wild card
- Underscore (_) – single character wild card

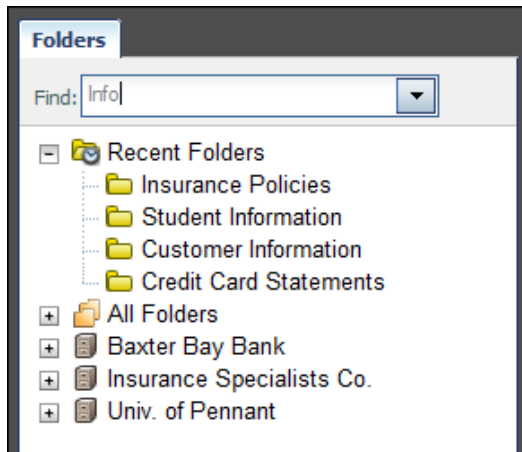
The navigation pane has two options, the Recent Folders and All Folders.

Option	Description
Recent Folders	This section lists the search forms that you used recently up to the most recent ten. The search forms are listed in order of use. The most recently used search is at the top of the list. This list is available each time you log in to ERM OnDemand. NOTE: A search form is displayed only once in your Recent Folder and is not duplicated.
All Folders	This section lists all of the search forms that you have access to.

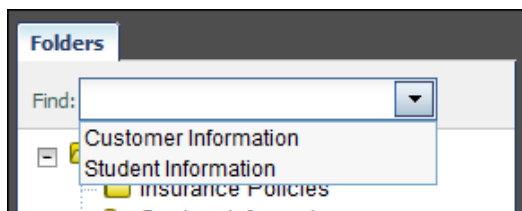
HINT: If you know which cabinet the folder is in, you can also select the folder from the cabinet, which is displayed in the list of search forms.

4.2. Using the Search Forms Pane

The **Find:** function searches for folders within the navigation pane and is limited to the search forms to which you have access.



1. Enter your selection in the **Find:** field and press **Enter**. Your search results are displayed in the drop-down list.

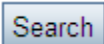
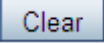
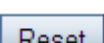
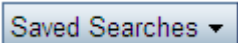


2. Click your selection and the search form displays.

A screenshot of the 'Search In Customer Information' form. The form is titled 'Search In Customer Information' and 'Demo Folder'. It contains several search criteria: 'Customer Name' (Like), 'Account' (Like), 'Date' (Between 01/01/05 and 12/31/05), 'Balance' (Equals), and 'Document' (Equals). There are radio buttons for 'ALL of these values' (selected) and 'ANY of these values'. At the bottom, there are buttons for 'Search', 'Clear', 'Reset', and 'Saved Searches'. A checkbox labeled 'Keep search criteria open after clicking Search' is also present. The form is part of a larger interface with a 'Folders' pane on the left and a header bar at the top.

Figure 3 - Search

4.3. Other functions and navigation

Function or Navigation	Description
	Search – Initiates search
	Clear – Clears all search fields
	Reset – Resets all search fields to their original default values
	List of Saved Searches – Contains a list of all saved searches
	View – Opens the document in a separate viewing window
	Edit Properties – Based on security settings
	Send Link by E-mail - Adds a link to the document that is stored in the content repository to a new e-mail. Note: This functionality is not enabled at this time
	Send Document by E-mail - Adds the document as an attachment to a new e-mail. Note: This functionality is not enabled at this time
	View Annotations - Based on security settings
	Download – Downloads document properties but not the actual document
	Refresh Content – Re-execute the search
	Select all – Selects or deselects all documents in the search results list. Each time it is clicked it will toggle between selecting all or deselecting all of the search results.

5. Searching for a document

To initiate a search, click a folder from the **Search Forms pane** on the left side of the screen.

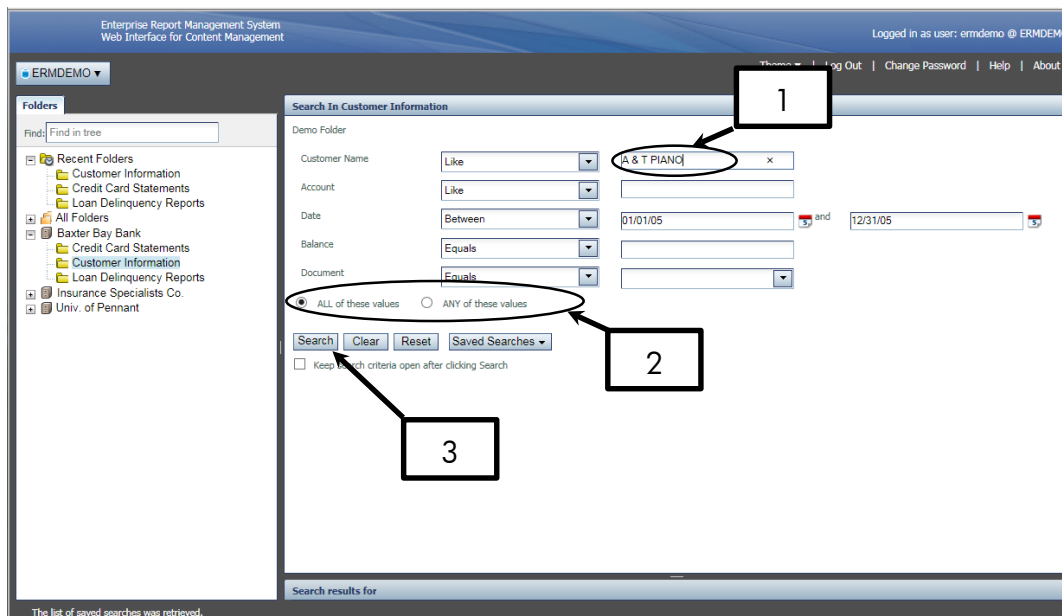


Figure 4 - Search

To search for a document:

1. Enter the search criteria in the search pane. The search fields displayed in the search pane change depending on the folder selected. The search fields that display in the search pane can include:

- Custom-defined properties that are specific to your business environment (for example, policy number or last name)
- System properties (for example, creation date or version number)
- Search operators (for example, Equal, Between or Like)

*HINT: You can access saved searches by clicking **Saved Searches**, **All**, and search name.*

2. Select whether to search on any or all of the values that are entered as part of the search criteria.
 - If **ALL of these values** is selected, the search uses the operator AND, which links the criteria to find matching documents if all of the criteria exist in a document. This is the default setting.
 - If **ANY of these values** is selected, the search uses the operator OR, which links the criteria to find matching documents if any of the criteria exist in a document.

NOTE: If you enter search criteria in a date field, the value that is entered is included in your search with the AND search operator. This means that the documents that are returned by the search must include the date and all of the other search criteria.

3. Click **Search**. Your search results are displayed in the search results list.

Report search results list

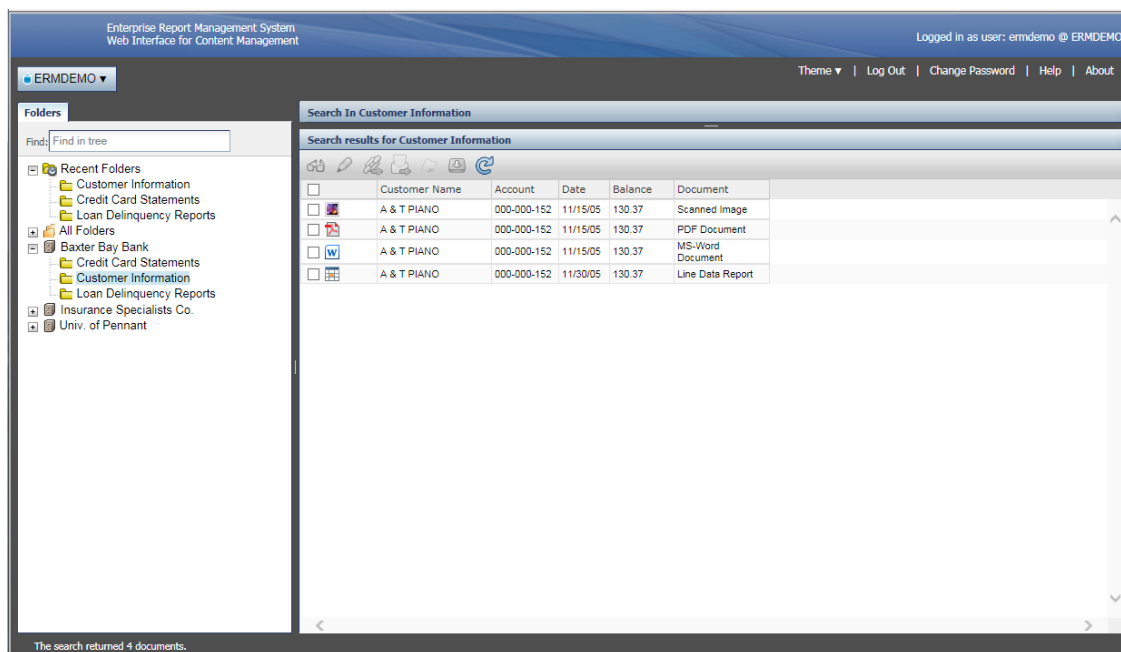


Figure 5 - Search Results List

NOTE: If a search criteria is entered for a report that does not exist, the search results will be empty.

Search results can be sorted by clicking the column name of the property that you want to sort on.

6. Viewing a document

After initiating a search and search results are displayed, when a document is selected the viewer will display document in a secondary window.

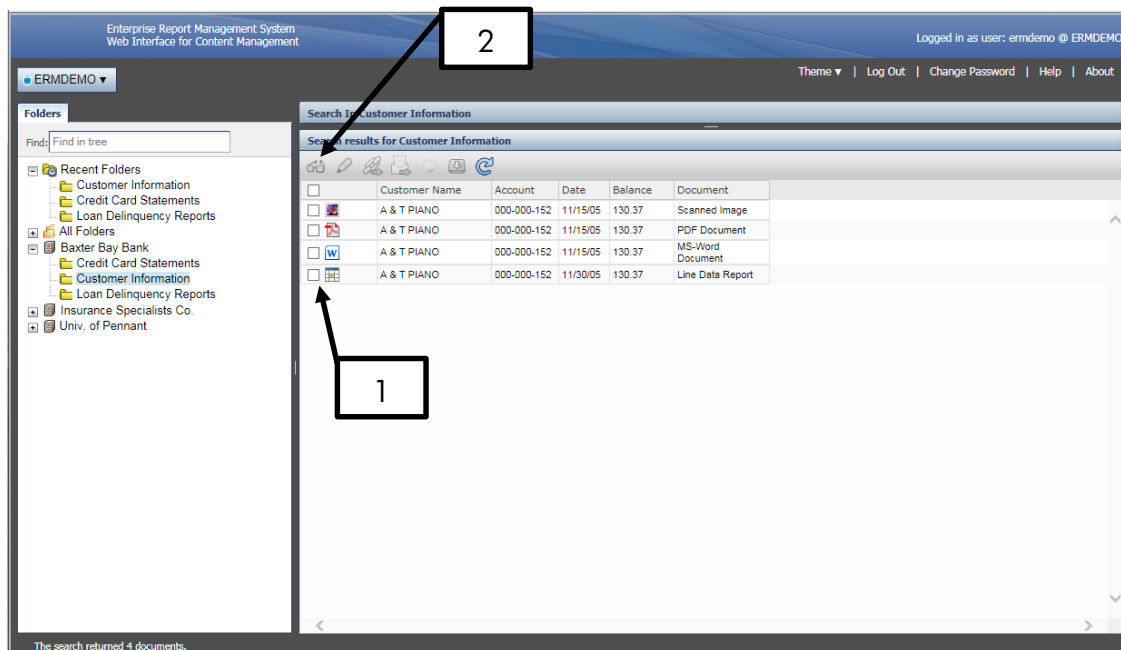


Figure 6 – Viewing a document

1. To view a document click the checkbox beside the document in the search results list window.
2. Click **View** .

Note: To select all of the search result items, click the select all box at the top of the column. By default, each document is displayed on a separate tab in the Viewer pane.

HINT: To quickly select a single document without having to select the check box and the view icon, just select the document type icon next to the checkbox.

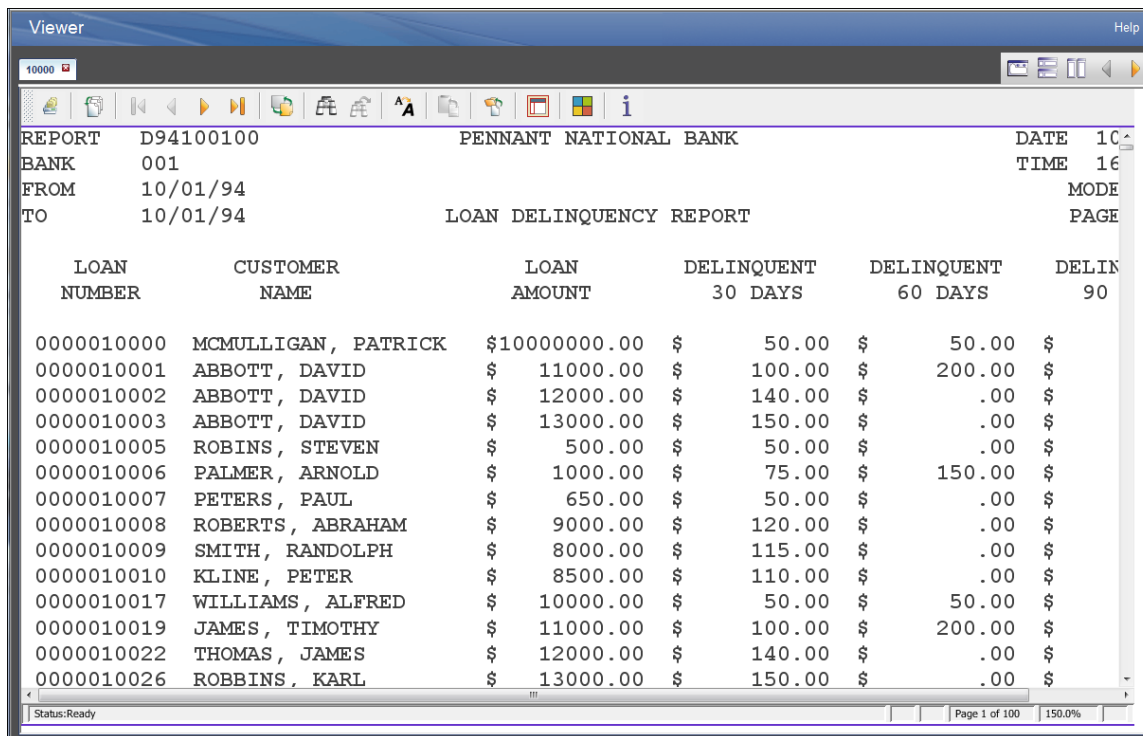
Within the Viewer pane you can use the viewer menu bar to view a document, to split the window and view two documents at the same time or to display the previous/next document in the search results list.

By clicking the vertical or horizontal buttons, you can view two documents at the same time. To move to the previous or next document use the arrow buttons.



Depending on the document type (for example, Report, Claim), additional functions will be available. These functions allow you to change how the document is displayed in the viewer, for example, Zoom Out, Zoom In, Rotate, and Invert if these functions are available.

6.1. Line Data



Viewer

10000

REPORT D94100100 PENNANT NATIONAL BANK DATE 10/01/94
 BANK 001 TIME 16:00
 FROM 10/01/94 MODE
 TO 10/01/94 PAGE

LOAN DELINQUENCY REPORT

LOAN NUMBER	CUSTOMER NAME	LOAN AMOUNT	DELINQUENT 30 DAYS	DELINQUENT 60 DAYS	DELINQUENT 90 DAYS
0000010000	MCMULLIGAN, PATRICK	\$10000000.00	\$ 50.00	\$ 50.00	\$
0000010001	ABBOTT, DAVID	\$ 11000.00	\$ 100.00	\$ 200.00	\$
0000010002	ABBOTT, DAVID	\$ 12000.00	\$ 140.00	\$.00	\$
0000010003	ABBOTT, DAVID	\$ 13000.00	\$ 150.00	\$.00	\$
0000010005	ROBINS, STEVEN	\$ 500.00	\$ 50.00	\$.00	\$
0000010006	PALMER, ARNOLD	\$ 1000.00	\$ 75.00	\$ 150.00	\$
0000010007	PETERS, PAUL	\$ 650.00	\$ 50.00	\$.00	\$
0000010008	ROBERTS, ABRAHAM	\$ 9000.00	\$ 120.00	\$.00	\$
0000010009	SMITH, RANDOLPH	\$ 8000.00	\$ 115.00	\$.00	\$
0000010010	KLINE, PETER	\$ 8500.00	\$ 110.00	\$.00	\$
0000010017	WILLIAMS, ALFRED	\$ 10000.00	\$ 50.00	\$ 50.00	\$
0000010019	JAMES, TIMOTHY	\$ 11000.00	\$ 100.00	\$ 200.00	\$
0000010022	THOMAS, JAMES	\$ 12000.00	\$ 140.00	\$.00	\$
0000010026	ROBBINS, KARL	\$ 13000.00	\$ 150.00	\$.00	\$

Status: Ready Page 1 of 100 150.0%

Figure 7 – Sample View - Line Data Viewer



Figure 8 – Line Data Viewer Menu Bar

Toolbar Icons:

	Print		Find
	Go to page		Find Next
	First page		Font
	Previous page		Copy to Clipboard
	Next page		Copy Pages to file
	Last page		Change Logical View
	View/Add Annotations		Change highlight color
			Display About dialog box

6.2. Image Data

When using the Viewer to view a image, a thumb nail field is included to the right of the image. The red box within the thumb nail allows the user to view different parts of the image. By clicking on the red box, you can drag it to the section of the image you want to view. To zoom in or out of the image, use the bottom right corner of the red box. The thumb nail field also allows the user to see how many pages are included for the image.

Viewer Help

09/28/11 15:05:25

77%

Dental Claim Form

112152000580 112552000010

© American Dental Association, 2009

HEADER INFORMATION

1. Type of Transaction (Mark all applicable boxes)

☒ Statement of Actual Services ☐ Request for Predetermination/Priorauthorization

☐ EPSDT/Title XIX

2. Predetermination/Priorauthorization Number

INSURANCE COMPANY/DENTAL BENEFIT PLAN INFORMATION

3. Company/Plan Name, Address, City, State, Zip Code

POLICYHOLDER/SUBSCRIBER INFORMATION (For Insurance Company Named in #3)

12. Policyholder/Subscrber Name (Last, First, Middle Initial, Suffix), Address, City, State, Zip Code

13. Date of Birth (MM/DD/CCYY) 14. Gender ☒ M ☐ F 15. Policyholder/Subscrber ID (SSN or ID#)

16. Plan/Group Number 17. Employer Name

OTHER COVERAGE

4. Other Dental or Medical Coverage? ☒ No (Skip 5-11) ☐ Yes (Complete 5-11)

5. Name of Policyholder/Subscrber in #4 (Last, First, Middle Initial, Suffix)

6. Date of Birth (MM/DD/CCYY) 7. Gender ☐ M ☐ F 8. Policyholder/Subscrber ID (SSN or ID#)

PATIENT INFORMATION

18. Relationship to Policyholder/Subscrber in #12 Above ☒ Self ☐ Spouse ☐ Dependent Child ☐ Other

19. Student Status ☐ FTS ☐ PTS

20. Name (Last, First, Middle Initial, Suffix), Address, City, State, Zip Code

01

Figure 9 - Sample view – Image Viewer



Figure 10 – Image Viewer Menu Bar

Toolbar Icons:

	Export		Fit to Width
	Print Document		Fit in Window
	Select Area		Rotate
	Copy		Enhance Document
	Find		Invert Document
	Zoom Out		Adjust Image
	Zoom In		Hide/Show Thumbnails
	Fit to Height		Preferences

6.3. AFP Data

AFP Viewer example -

BAXTER BAY BANK
February 1995

PAGE 1

STATEMENT DATE		MAKE CHECKS PAYABLE TO: BigBucksCard
02/01/95		
CREDIT LIMIT		DIRECT PAYMENT OR INQUIRIES TO: BigBucksCard Center
34999.00		CUSTOMER SERVICES
CREDIT AVAILABLE	AMOUNT OVER LIMIT	P.O. BOX 100/BOULDER, CO 99999
34602	0	PHONE (123) 123-4567
ACCOUNT NUMBER		
000-000-004		

A & A ASBESTOS
0
ENGLEWOOD, NJ

\$
AMOUNT PAID

PLEASE DETACH AND RETURN THIS TOP PORTION WITH PAYMENT

PAST DUE	+	CURRENT DUE	=	MINIMUM PAYMENT DUE	PAY EITHER	NEW BALANCE	PAY NEW BALANCE BY THIS DATE TO AVOID ADDITIONAL FINANCE CHARGE	YEAR-TO-DATE FINANCE CHARGE
-----------------	----------	--------------------	----------	----------------------------	-------------------	--------------------	--	------------------------------------

Figure 11 - Sample view – AFP Viewer



Figure 12 – AFP Viewer Menu Bar

Toolbar Icons:

	Zoom		Find Next
	Rotate Page		Go to First Page
	Reset View		Go to Previous Page
	Hide/Show Images		Go to Next Page
	Select Rectangular Area		Go to Last Page
	Select Text		Display Code Page/Font Information
	Copy Selection to Clipboard		Print
	Go to Specific Page		Display About dialog box
	Find		

6.4. Other Data Types

Additional document types, including Adobe PDF files, spreadsheet data and HTML files are also available and will be viewed in their native applications.

Viewer 10/10/11 13:16:15

☐ CORRECTED (if checked)

PAYER'S name, street address, city, state, ZIP code, and telephone no.
Questions? Call (877) 638-3472

PAYER'S federal identification number

RECIPIENT'S identification number

RECIPIENT'S name
2.2.266 1 AT 0.340 b4759811.ps 1-2

Account number (see instructions)

Form 1099-MISC (keep for your records)

Copy B For Recipient This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

Department of the Treasury - Internal Revenue Service

2010 Miscellaneous Income

1 Rents \$

2 Royalties \$

3 Other income \$ 0.00

4 Federal income tax withheld \$ 0.00

5 Fishing boat proceeds \$

6 Medical and health care payments \$

7 Nonemployee compensation \$ 0.00

8 Substitute payments in lieu of dividends or interest \$

9 Payer made direct sales of \$5,000 or more of consumer products to a buyer (recipient) for resale ☐ \$

10 Crop insurance proceeds \$

11 Excess golden parachute payment \$

12 State tax withheld \$

13 State/Payer's state no. \$

14 Gross proceeds paid to an attorney \$

15a Section 409A deferrals \$

15b Section 409A income \$

16 State tax withheld \$

17 State/Payer's state no. \$

18 State income \$

Figure 13 - Sample view – Adobe Acrobat Reader

MR-O-001-018_06-21-11[1].xlsx - Microsoft Excel

AS OF: 06/21/2011
RUN DATE: 06/24/2011

FINANCING AND POLICY
MEDICAL ASSISTANCE FINANCIAL STATUS BY GL SUBPROGRAM

RPT NO: MR-O-001-018
PAGE NO: 1 of 1

Subprogram	Budget Amount	Total Cost of Coverage MARS	Total Cost of Coverage MARS	Budget Amount	Total Cost of Coverage MARS	Total Cost of Coverage MARS
0012 TANF/CHAP/Checkup/Preg Women	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
0014 Medical Assistance to the Aged	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
0015 Waiver	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
0017 County Match	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
0018 Mental Health or State Only	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
0019 Division of Child and Family S	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
0020 School Based Svcs/Health Div	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
0024 Pass Thru to Local Government	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
0028 OFFLINE	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
0029 Payment to DCFS	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
-- Missing	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

MR-O-001-018

Ready Page: 1 of 1

Figure 14 - Sample view – Microsoft Excel

7. Saving documents

Documents can be saved for later use when you do not have access to ERM OnDemand by downloading the documents to your workstation.

7.1. Downloading document properties

Document properties can be downloaded which will allow the user to save the results of the query performed to a Comma Separated Values (CSV) file.

To download the document properties:

1. Select one or more documents from the list of search results or work items. When selecting multiple documents, the properties of all the documents are stored in a single CSV file.

NOTE: A warning message might be displayed depending on the browser security settings.

2. Click  Download.
3. Specify the directory where to store the document properties (query results) on your workstation.

A CSV file that includes data about the document will be saved. For example, if you download the properties file for an insurance claim, the properties file might include a claim number, the name of the claimant, and the date the claim was received.

The imported data can be saved into a spreadsheet or copied into an e-mail or document.

8. Tooltips

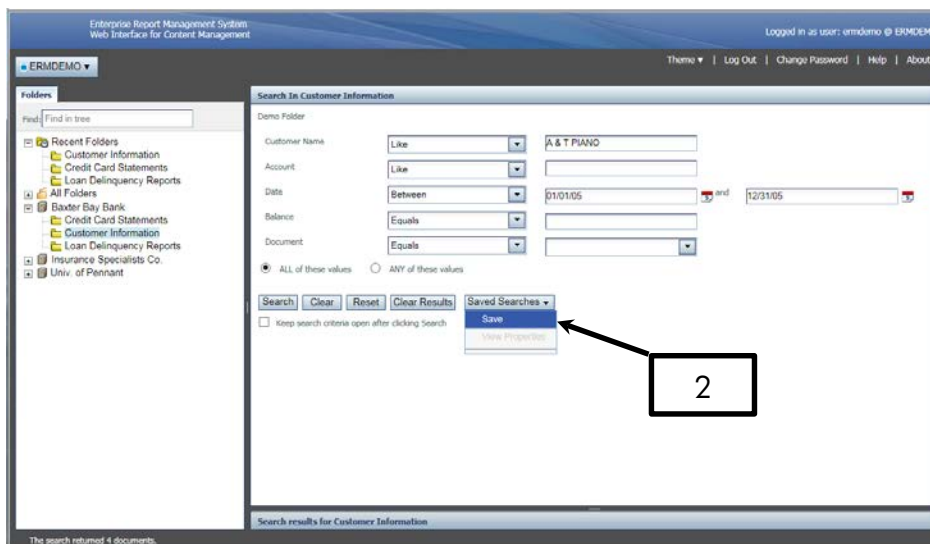
8.1. Saving a search

To save time, you can save your search criteria. Once a search is saved you do not need to manually reenter your search criteria each time you need to search for a frequently used set of documents.

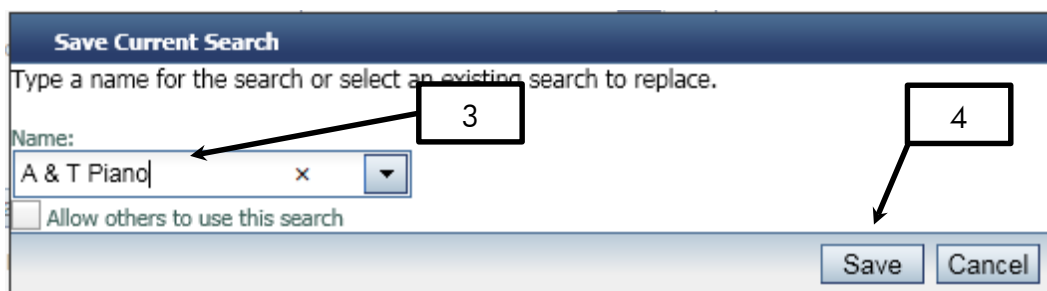
To save your search criteria:

The screenshot shows the 'Search in Customer Information' window. On the left is a 'Folders' pane with a tree view showing 'Recent Folders' (Customer Information, Credit Card Statements, Loan Delinquency Reports) and 'All Folders' (Baxter Bay Bank, Credit Card Statements, Customer Information, Loan Delinquency Reports, Insurance Specialists Co., Univ. of Pennant). The main search area has fields for Customer Name (Like A & T PIANO), Account (Like), Date (Between 01/01/05 and 12/31/05), Balance (Equals), and Document (Equals). Below these are radio buttons for 'ALL of these values' (selected) and 'ANY of these values'. At the bottom are buttons for Search, Clear, Reset, and Saved Searches. A black arrow points from a box containing the number '1' to the Date field. The status bar at the bottom says 'The list of saved searches was retrieved.'

1. Enter search criteria.



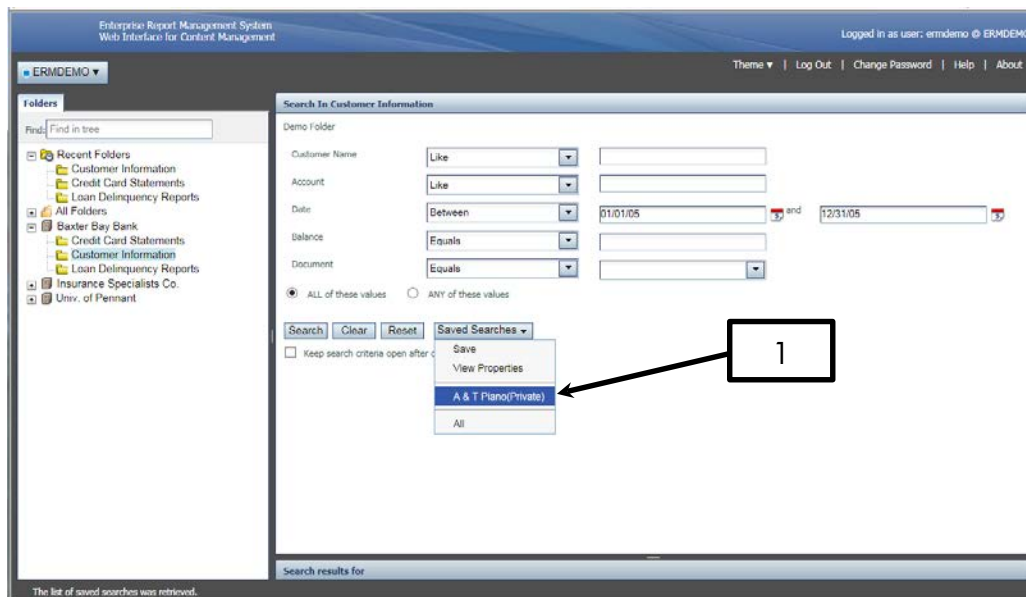
2. Click **Saved Searches** and then **Save**.



3. Enter a name for the saved search.
4. Click **Save**.

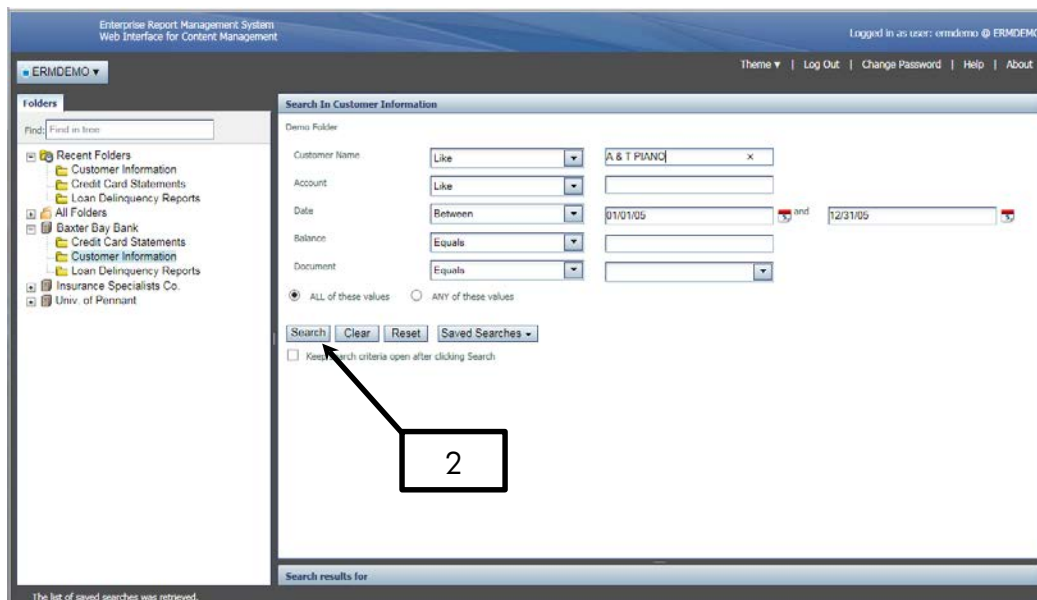
8.2. Using a named search

To use saved searches:



1. Click **Saved Searches**; select the search name from the drop-down menu.

Upon selecting the Saved Search, the search criteria is automatically populated. The Status Bar reflects which Saved Search was retrieved.



2. Click **Search**.

8.3. Additional date field search operator

When searching date fields instead of using the drop-down calendar, you can enter a "t", where "t" is today's date. You can also enter a "+" or "-" and a number, which adds or subtracts from the current date. For example "t-5" translates to today's date minus 5 days.

NOTE: Quotation marks are not entered.

Search In Customer Information

Demo Folder

Customer Name	Like	
Account	Like	
Date	Equals	t-5
Balance	Equals	
Document	Equals	

☒ ALL of these values ☐ ANY of these values

☐ Keep search criteria open after clicking Search

Appendix A. WEBi Quick reference guide

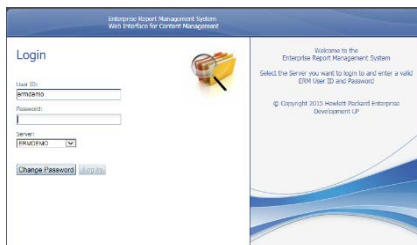
WEBi is the new enhanced Web Interface to the ERM repository. This is the program which will be used to search for and retrieve documents and reports stored in the ERM repository.

Getting Started:

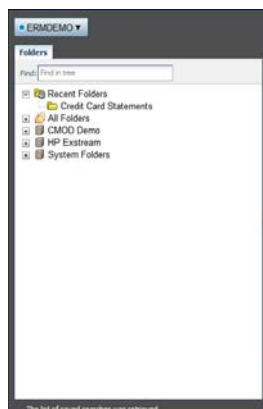
1. Open a supported browser and navigate to the ERM web site:

<https://webi.erm.svcs.hpe.com/wccommonservices/DESKTOP.do>

*Note: Your **DESKTOP** name is client specific, contact your ERM OnDemand Support if needed.*



2. Enter your ERM OnDemand User Name & Password.
3. Press the Change Password button if you need to change your ERM password. You'll be presented with standard options to enter your existing ID and PW as well as a new password and confirmation.
4. If you have already done searches within WEBi, you can choose folders in your "Recent Folders", which saves your 10 most recent folders.



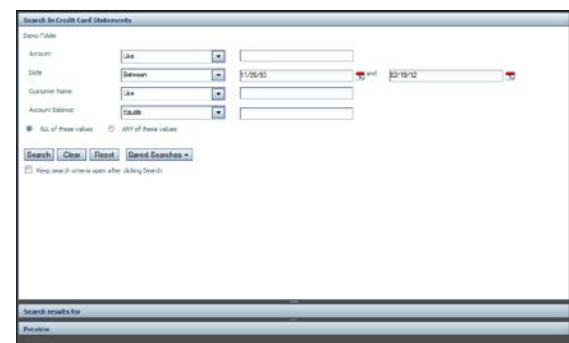
The Folders navigation pane displays the Folders and Cabinets (if enabled) the user is authorized to view.

Finding Folders:

1. Enter the name or partial name of the folder you want to find in the Find text window.
Note: You can use standard wildcard characters.
2. Press enter and select the desired Folder from the drop-down list.

Searching For Documents/Reports:

1. If Cabinets are enabled you can expand the desired cabinet to list the available Folders.
2. Choose the Folder in which you wish to search.



3. Enter your search criteria and press the 'Search' button.

Other buttons:

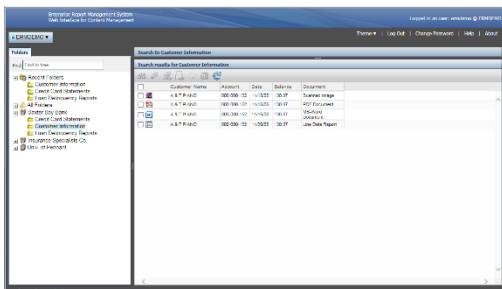
- Clear - clears the search criteria values
- Reset - resets the search criteria to default values
- Saved Searches - save current search or view/select previous saved searches

Other Options:

- ALL of these values
- ANY of these values
- Keep search criteria open after clicking Search

Viewing Search Results:

1. To view the document click the document icon next to the check box for the desired entry in the list.
2. To view multiple documents, select each desired document by checking the appropriate checkbox then pressing the View icon.



Checkbox - toggles all individual list item check boxes

Column Header - clicking the column headers will sort the list on that column

Toolbar Icons:



View selected documents



Edit Properties (if enabled) - Change the value of selected record's fields



View Annotations (if enabled) - View/Add "sticky note" annotations



Download - download the Search results list to a CSV file



Refresh - refresh the Search results list by re-executing the current search

Viewing Documents/Reports:

Once a document is selected to view, the WEBi Viewer window is opened and the selected document(s) are displayed in their defined document viewers.

Depending on how the user's browser is configured, the Viewer may be opened in a new window or a new tab within the current window.

Viewer Toolbar Icons:



Help - Show online help

Document Tabs



Tabbed Layout



Split Vertical Layout - View two documents, one on top of the other



Split Horizontal Layout - View two documents, side-by-side

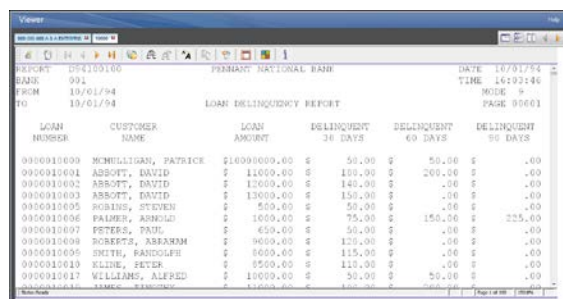


Previous Document in Results - Open previous document in the Search Results list



Next Document in Results - Open next document in the Search Results list

Java Line Data Viewer Applet:

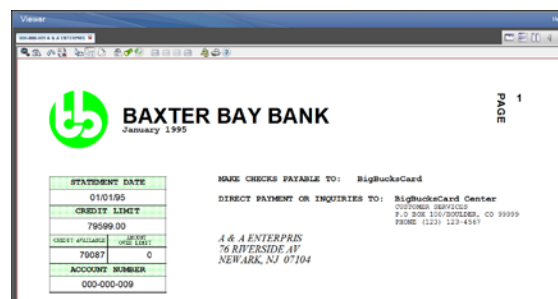


LOAN NUMBER	CUSTOMER NAME	LOAN AMOUNT	DELINQUENT 30 DAYS	DELINQUENT 60 DAYS	DELINQUENT 90 DAYS
0900010000	MCNEILLIGAN, PATRICE	\$10000000.00	\$ 50.00	\$ 50.00	\$.00
0900010001	ABBOTT, DAVID	\$ 11000.00	\$ 100.00	\$ 200.00	\$.00
0900010002	ABBOTT, DAVID	\$ 12000.00	\$ 140.00	\$.00	\$.00
0900010003	ABBOTT, DAVID	\$ 13000.00	\$ 150.00	\$.00	\$.00
0900010005	ROBIN, STEVEN	\$ 500.00	\$ 50.00	\$.00	\$.00
0900010006	PALMER, ARNOLD	\$ 1000.00	\$ 75.00	\$ 150.00	\$ 225.00
0900010007	PETERS, PAUL	\$ 400.00	\$ 50.00	\$.00	\$.00
0900010009	ROBERTS, ABRAHAM	\$ 9000.00	\$ 120.00	\$.00	\$.00
0900010005	SMITH, RANDOLPH	\$ 6000.00	\$ 115.00	\$.00	\$.00
0900010010	KLING, BETY	\$ 5500.00	\$ 110.00	\$.00	\$.00
0900010017	WILLIAMS, ALFRED	\$ 10000.00	\$ 50.00	\$.00	\$.00
0900010018	SMITH, RANDOLPH	\$ 11000.00	\$ 100.00	\$.00	\$.00

Toolbar Icons:

-  Print
-  Go to page
-  First page
-  Previous page
-  Next page
-  Last page
-  View/Add Annotations
-  Find
-  Find Next
-  Font
-  Copy to Clipboard
-  Copy Pages to file
-  Change Logical View
-  Change highlight color
-  Display About dialog box

AFP Viewer Plugin:

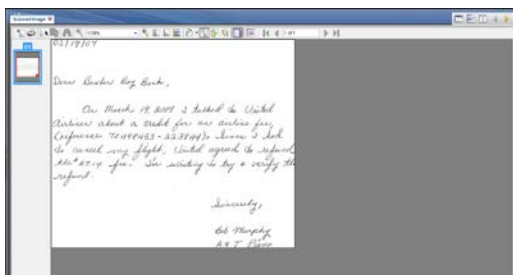


BAXTER BAY BANK	
January 1995	
STATEMENT DATE	01/01/95
CREDIT LIMIT	79099.00
CREDIT AVAILABLE	UP TO \$101
ACCOUNT NUMBER	79087 0
000-000-009	
MAKE CHECKS PAYABLE TO: BigbucksCard	
DIRECT PAYMENT OR INQUIRIES TO: BigbucksCard Center	
CUSTOMER SERVICE	
P.O. BOX 100/PO BOX, CO 80000	
PHONE (123) 123-4567	
A & A ENTERPRISE	
76 RIVERIDE AV	
NEWARK, NJ 07104	

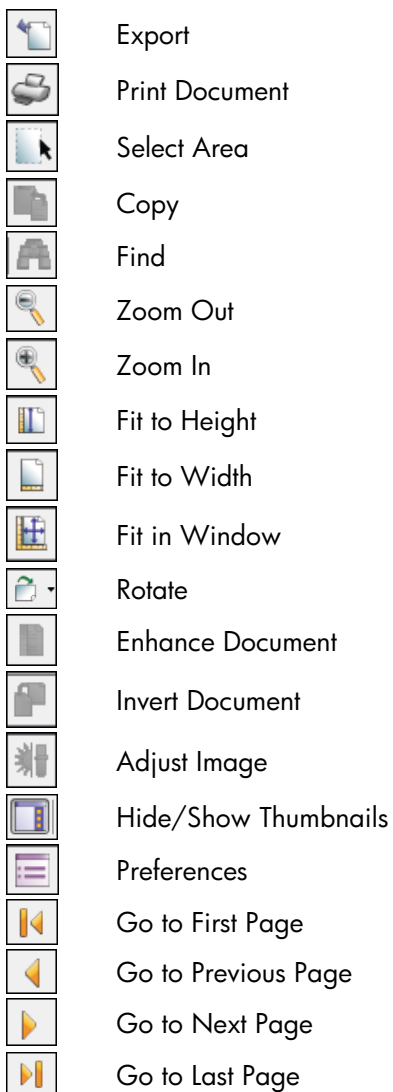
Toolbar Icons:

-  Zoom
-  Rotate Page
-  Reset View
-  Hide/Show Images
-  Select Rectangular Area
-  Select Text
-  Copy Selection to Clipboard
-  Go to Specific Page
-  Find
-  Find Next
-  Go to First Page
-  Go to Previous Page
-  Go to Next Page
-  Go to Last Page
-  Display Code Page/Font Information
-  Print
-  Display About dialog box

Java Applet Viewer (Images):



Toolbar Icons:



The Java Applet Viewer also supports Thumbnails.

The thumbnails can be configured to display in different locations on the screen via the Preferences toolbar button:

